Accessing ECF

Access to the CM/ECF system is gained through using the Netscape Navigator or Internet Explorer WEB browser.

STEP 1 Open the WEB browser and enter the URL (address) in the browser's **Location** field. https://ecf.mab.uscourts.gov **(See Figure 1)**

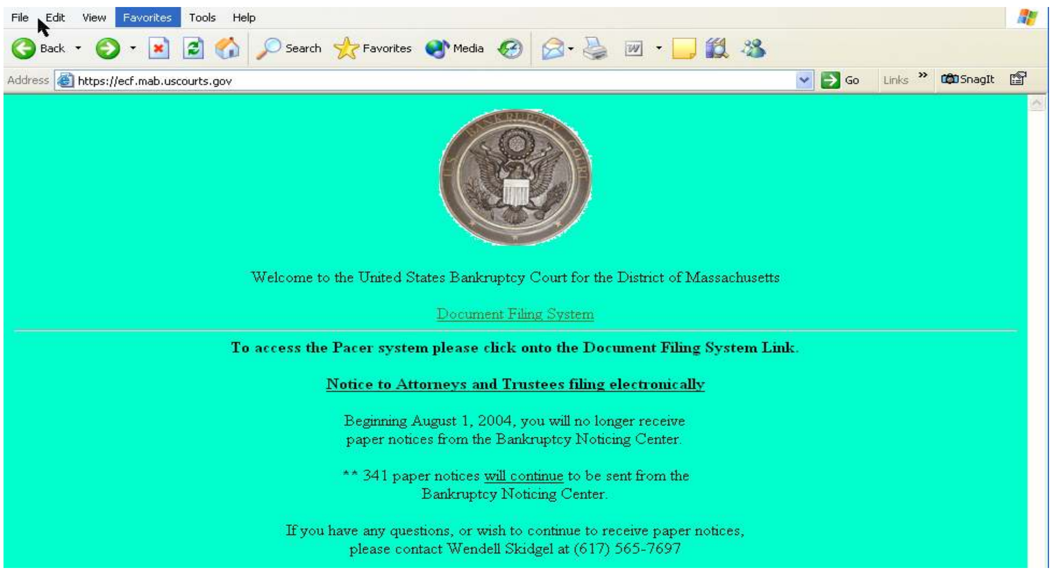


Figure 1

STEP 2 Click on the hypertext link: District of Massachusetts - Document Filing System.

STEP 3 The **ECF/Pacer Login** screen displays. **(See Figure 2)**

.

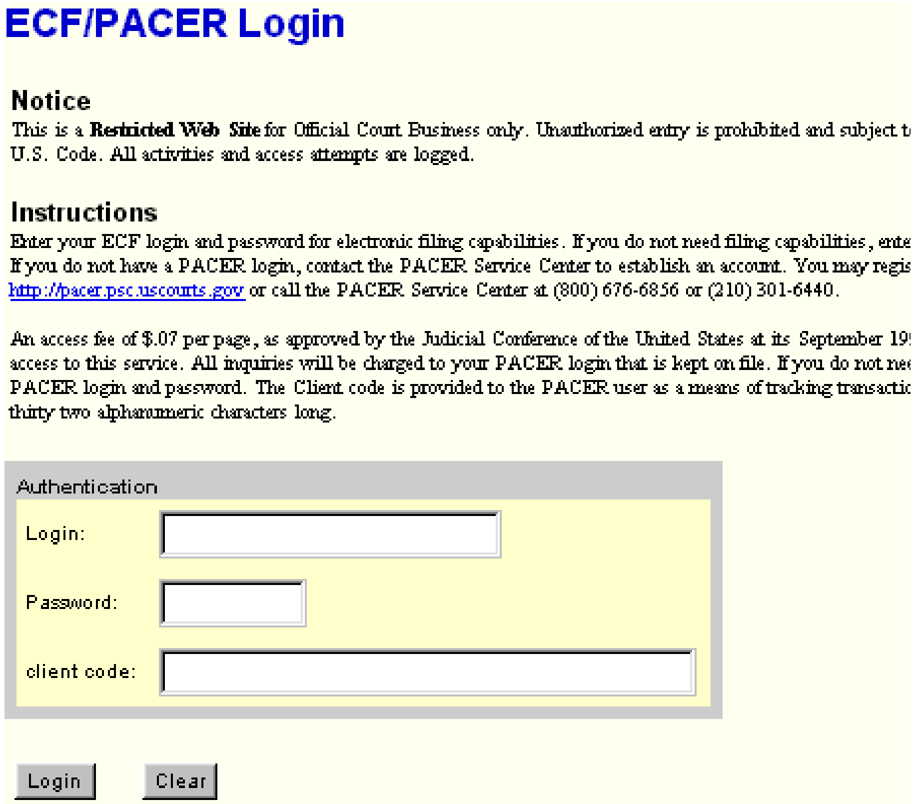


Figure 2

— Enter your **Login** and **Password**. Your login and password are case sensitive. For Example, a login of thomask should not be ThomasK or THOMASK. Enter a client code if desired

— Click **[Login]** to continue.

NOTE: The **preferred method** to exit CM/ECF is to click the **<u>Logout</u>** hypertext link on the CM/ECF Main Menu Bar.

Add Creditors

Step	Action
1	Click on the **Bankruptcy** hyperlink at the top of the screen.
2	Click on **Creditor Maintenance.**
3	Click on **Enter individual creditors.**
4	Enter the case number in yy-nnnnn format and click **Next**. Check the case name and number to be sure it is the correct case.
5	At the **Add Creditor(s)** screen enter the name and address of the creditor(s) being added to the case. **FORMAT** for adding creditors is as follows: Name: XYZ Mortgage Company Address 1: c/o Joe Lawyer, Esq. Address 2: P.O. Box 25 Address 3: Boston, MA 02114 * Address 4: Address 5: *Do Not use extensions to zip codes. Do Not Change Creditor Type default. Do Not Change Creditor Committee default. Continue to add creditors, when you have entered the last creditor, select **Last Entry** and click **Next**.
6	The **Total Creditors Entered** screen will display the case number and the number of creditors added to the database during this transaction.
7	Click **Submit** and the name will be added.

CREDITOR - QUICK REFERENCE GUIDE

Request for Notice (Batch)   Creditor Event Only

Step	Action
1	Click on the **Bankruptcy** hyperlink at the top of the screen.
2	Click on **Creditor Filings**. The **File a Court Document** screen displays. Enter the case number in the box below in the yy-nnnnn format.
3	Click **Next**. Check the case name and number to be sure it is the correct case. Select **Request for Notice (creditor even only) (Batch)** and click **Next**.
4	The File Court Document screen displays. Click the **BROWSE** button to launch the Adobe Acrobat Reader. Locate the document you wish to attach to this event, right click to Open and verify the PDF. **Select** the correct **PDF** and click **Open**.
5	Enter the name of the Party filing the Notice of Request in the appropriate fields. Click **NEXT**.
6	A message screen will display a reminder to you to add the creditor to the case through Creditor Maintenance. (To add creditors, see the **Add Creditor** quick reference guide.) Click **NEXT**.
7	A blank screen will appear. Click **Next**.
8	The **Docket Text: Final Text** screen displays. This is your last opportunity to proof read your entry and back-out of the transaction. Check your entry and click **Next** to submit it to the court.
9	The Notice of Electronic Filing screen displays and your transaction is complete. You may wish to save a copy of this transaction log for your records.

Notice of Withdrawal of Claim

Step	Action
1	Click on the **Bankruptcy** hyperlink at the top of the screen.
2	Click on **Creditor Filings**. The **File a Court Document** screen displays. Enter the case number in the box below in the yy-nnnnn format.
3	Click **Next**. Check the case name and number to be sure it is the correct case. Select **Notice of Withdrawal of Claim (Creditor)** and click **Next**.
4	Click the **BROWSE** button to launch the Adobe Acrobat Reader. Locate the document you wish to attach to this event, right click to Open and Verify the PDF. **Select** the correct **PDF** and click **Open**.
5	Enter the Name of the Party submitting the Notice of Withdrawal of Claim and click **NEXT**.
6	Enter the **Claim Number** and the **Amount of the Claim** being withdrawn. Click **Next**.
7	You are in the Docket Text: Final Text Screen. Check your entry and click **Next** to submit it to the court.
8	The Notice of Electronic Filing screen displays and your transaction is complete. You may wish to save a copy of this transaction log for your records.

CREDITOR - QUICK REFERENCE GUIDE

Notice of Appearance and Request for Creditor Notices   Attorney Only Event

Step	Action
1	Click on the **Bankruptcy** hyperlink at the top of the screen.
2	Click on **Creditor Filings**. The **File a Court Document** screen displays. Enter the case number in the box below in the yy-nnnnn format.
3	Click **Next**. Check the case name and number to be sure it is the correct case. Select **Notice of Appearance and Request for Creditor Notices (Attorney Event Only)** and click **Next**.
4	Click the **BROWSE** button to launch the Adobe Acrobat Reader. Locate the document you wish to attach to this event, right click to Open and verify the PDF. **Select** the correct **PDF** and click **Open**.
5	**Do Not** change the attachments default. Click **Next.**
6	The **Docket Text: Modify as Appropriate** screen displays. Enter Name of Creditor and any other additional information into the text box as appropriate. Click **NEXT**.
7	The **Docket Text: Final Text** screen displays. This is your last opportunity to proof read your entry and back-out of the transaction. Check your entry and click **Next** to submit it to the court.
8	The Notice of Electronic Filing screen displays and your transaction is complete. You may wish to save a copy of this transaction log for your records.

Notice of Assignment/Transfer of Claim (Batch)

Step	Action
1	Click on the **Bankruptcy** hyperlink at the top of the screen.
2	Click on **Creditor Filings**. The **File a Court Document** screen displays.
3	Enter the case number(s) in the box below in the yy-nnnnn format. Click **Next**.
4	Verify the case name and number to be sure it is the correct. Select Notice Assign/Transfer Claim (Batch). Click **Next**.
5	A warning message will appear regarding attaching a PDF for each case number. Click **Next**.
6	Click the **BROWSE** button to launch the Adobe Acrobat Reader. Locate the document you wish to attach to this event, right click to Open and verify the PDF. **Select** the correct **PDF** and click **Open**. Click **Next**.
7	Enter the **Name of the Party Submitting Notice of Transfer/Assignment of Claim** in the appropriate field(s). Click **NEXT**.
8	At the **Docket Text: Modify as Appropriate** screen verify that the text is correct. If correct, click **Next**. If incorrect, click the browser's **Back** button until you find the error(s) and are able to make the appropriate correction.
9	The Notice of Electronic Filing screen displays and your transaction is complete. You may wish to save a copy of this transaction log for your record.

CREDITOR - QUICK REFERENCE GUIDE

Proof of Claim

Step	Action
1	Click on the **Bankruptcy** hyperlink at the top of the screen
2	Click on **File Claims**
3	The **Search for Creditor** screen displays. Enter the **Case Number** in yy-nnnnn format. Enter the **Name of the Creditor** filing the claim. (You do not have to enter any creditor and all the creditors will be available for selection in a drop down box or you can just enter a few letters of the creditor's name and that creditor will be selected.) **Do Not** change the **Type of Creditor Box.** The default type must remain **Creditor.**
4	The **Select a Creditor for Claim** screen displays. Select the desired creditor by clicking on it with your mouse and click **Next**. Note: If the creditor is **not listed** or is **listed at a different address,** click on **Add Creditor.** • The **Creditor Processing** screen displays. Check the case name and number to be sure you are in the correct case. Click **Next**. • At the **Add Creditor** screen, enter the **Name** and **Address** of the creditor filing the claim. **Do not** use zip code extensions. **Do Not** Change the **Type of Creditor or Committee** defaults. • Check the **Last Entry Box** and click **Next**. • The **Add Creditors** screen displays stating that 1 creditor was added. • Click **Submit** and select **Proof of Claim** on the next screen. • Return to **Step 3**.
5	The **Proof of Claim Information** screen displays. Enter the **claim data** in the appropriate fields. **Do Not** use **$** or **commas** in the dollar amount fields. Click **Next.** Note: Status fields are controlled by the court. You may enter information into the **Description** and **Remarks** fields. Each field is limited to 60 characters.

6	Click **Browse** on the **PDF Document Selection** screen. Adobe Acrobat Reader will open. Locate and most important, *verify*, by highlighting the document* you wish to upload, right click with mouse, open, verify, if correct, click **Open** to attach and upload the proof of claim. * Documents may be no larger than 50 pages. If they are larger, use the attachment feature below.
7	If you have **attachments** to the Proof of Claim, click the radial button, yes and click **Next**. Browse and highlight the document, right click to open and verify the PDF and click **Open**. In the Description Field identify your attachment, the click on Add to List. When the filename appears in the box, click **Next.**
8	The Notice of Electronic Filing screen displays and your transaction is complete. You may wish to save a copy of this transaction log for your records.

Becket & Lee Notice Assign/Transfer Claim (Batch)

Step	Action
1	Click on the **Bankruptcy** hyperlink at the top of the screen.
2	Click on **Creditor Filings**. The **File a Court Document** screen displays.
3	Enter the case number(s) in the box below in the yy-nnnnn format. Click **Next**.
4	Verify the case name and number to be sure it is the correct. Select Becket & Lee Notice Assign/Transfer Claim (Batch). Click **Next**.
5	A warning message will appear regarding attaching a PDF for each case number. Click **Next**.
6	**Verify** the information in the File a Court Document Screen. Click **Next.**
7	At the **Docket Text: Final Text** screen verify that the text is correct. If correct, click **Next**. If incorrect, click the browser's **Back** button until you find the error(s) and are able to make the appropriate correction.
8	The Notice of Electronic Filing screen displays and your transaction is complete. You may wish to save a copy of this transaction log for your record.

Utilities and Reports

Claims Register

Step	Action
1	Click on the **Reports** hyperlink at the top of the screen.
2	Select **Claims Register**. Enter the case number in the yy-nnnnn format.
3	Click the **Run Report** button.
4	The report will generate and display any claims which have been filed and *entered* onto the register. Please note, other claims may have been filed with the court but not entered onto the Register. You must come to the court and examine the file for additional claims.

Utilities

Creditor Mailing Matrix

Step	Action
1	Click on the **Utilities** hyperlink at the top of the screen.
2	Select under Miscellaneous, **Mailings**
3	Select **Creditor Mailing Matrix**. Enter the case number in the yy-nnnnn format.
4	Click the **Run Report** button.
5	The Creditor Mailing Matrix will generate. The 1-column file can be saved as a text file on your computer with the browser's File/Save As feature. The saved file can then be edited and printed on labels or you can use the cut and paste option.

Utilities and Reports

View Your Transaction Log

Step	Action
1	Click on the **Utilities** hyperlink at the top of the screen.
2	Select **View your Transaction Log**. A date range screen will display.
3	Enter the **Date Selection Criteria** (start date and end date) for the Transaction Log Report and click **Submit**.
4	The report will generate and display any transactions performed under your login and password for the date range selected.
5	Review the log.

Utilities

Mailing Info for a Case

Step	Action
1	Click on the **Utilities** hyperlink at the top of the screen.
2	Select under Miscellaneous, **Mailings**
3	Select **Mailing Info for a Case**. Enter the case number in the yy-nnnnn format.
4	Enter the **Case Number**.
5	The Electronic Mail Notice List and Manual Notice List will be displayed.

Utilities and Reports

Change Your Password

Step	Action
1	Click on the **Utilities** hyperlink at the top of the screen.
2	Click on **Maintain Your ECF Account** button and your personal information screen will display.
3	Scroll to the bottom of the screen and click on the **More user information** button. The More user information screen will display revealing the login and password fields.
4	Your password will appear as all * stars. Enter your new Password here.
5	Click on the **Return to Account** button and you will be returned to your personal information screen.
6	Scroll to the bottom of the screen and click **Submit**. If you do not click the Submit button, your changes will not be saved.

Utilities and Reports

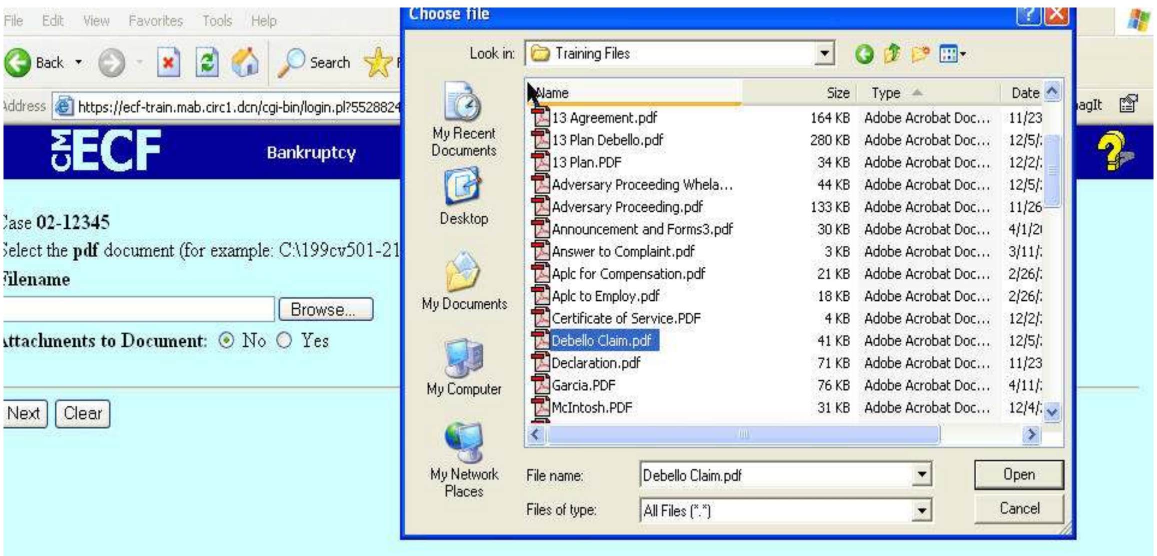
Maintain User Accounts

Step	Action
1	Click on the **Utilities** hyperlink at the top of the screen.
2	Select **Maintain Your ECF Account.** The user account screen will display.
3	Update your personal information on this screen. At the bottom of the screen are two buttons. • **Email Information** - button is used to request email notification on all cases which you are a party or on specific cases. (All activity includes notification of claims as well as other entries.) To receive notice, the email address must be correct. • **More user information** - button is used to change your password.
4	Click on the **Email Information** button and the email information screen displays. You will be presented with options for electronic notification on the court's ECF system. • You may request e-mail copies of notification on all cases to which you are a party or only on specific cases. • You may receive e-mail activity throughout the day or a daily summary of all noticing activity. Daily summaries are generated at midnight for the day's activities. Note: "All activity" includes notification of claims as well as other entries to a case. Each email will include the case number and name of the docket entry in the subject line of the mail message.

5	**Primary e-mail address.** This address must be formatted to Internet protocol or an error will be generated. It may be prudent to establish a separate e-mail account for CM/ECF activity from your routine email correspondence. **Enter an active email address in the primary email address field. Check the box in front of "to my primary email address" to activate ECF notification .** Note: You may have notices sent to other email addresses besides your primary email address. (Paralegals or other staff may want to share this notification activity.) When entering multiple e-mail addresses, separate each address with a semi-colon.
6	Make all appropriate changes and click on **Return to Account** screen.
7	Click **Submi**t to save your changes.

Selecting a PDF Document in ECF

Step	Action
1	Click on the **Browse** button to search your network or computer files navigating to the correct drive, folder and name of the file. See the figure below.



Step	Action
2	To make certain you are uploading the correct claim highlight the name of the file and right click the right mouse button. A small window box will open on top of the other screen.
3	Select **Open** and the document will display.
4	If it is the correct document, **Close** the document using the **"x"** at the top of the document screen. If it is not the correct document, repeat this procedure until the correct one is identified.
5	Once the document is closed, select **Open** and the path to upload the document will be populated in to the field. Click **Next** to continue to file your document.

Converting Scanned Documents to PDF Using Acrobat Software

There are two ways to convert documents into PDF (Portable Document Format) files. One way is to convert documents that are created in your word processing system. The other way is to convert documents (such as attachments and exhibits) utilizing scanning equipment and Adobe Acrobat software. This module (Part II) will guide you through the process of converting scanned documents to PDF format utilizing scanning equipment and Adobe Acrobat software. Part I explains the process of converting word processing documents into PDF format.

Converting Scanned Documents to PDF Format Using Adobe Acrobat Software

STEP 1 Place document and all attachments or exhibits on the scanner bed.

STEP 2 With document in place, launch Adobe Acrobat software by double-clicking on the desktop icon for Adobe Acrobat.

STEP 3 A blank **Adobe Acrobat Image Screen** displays. **(See Figure 1)**

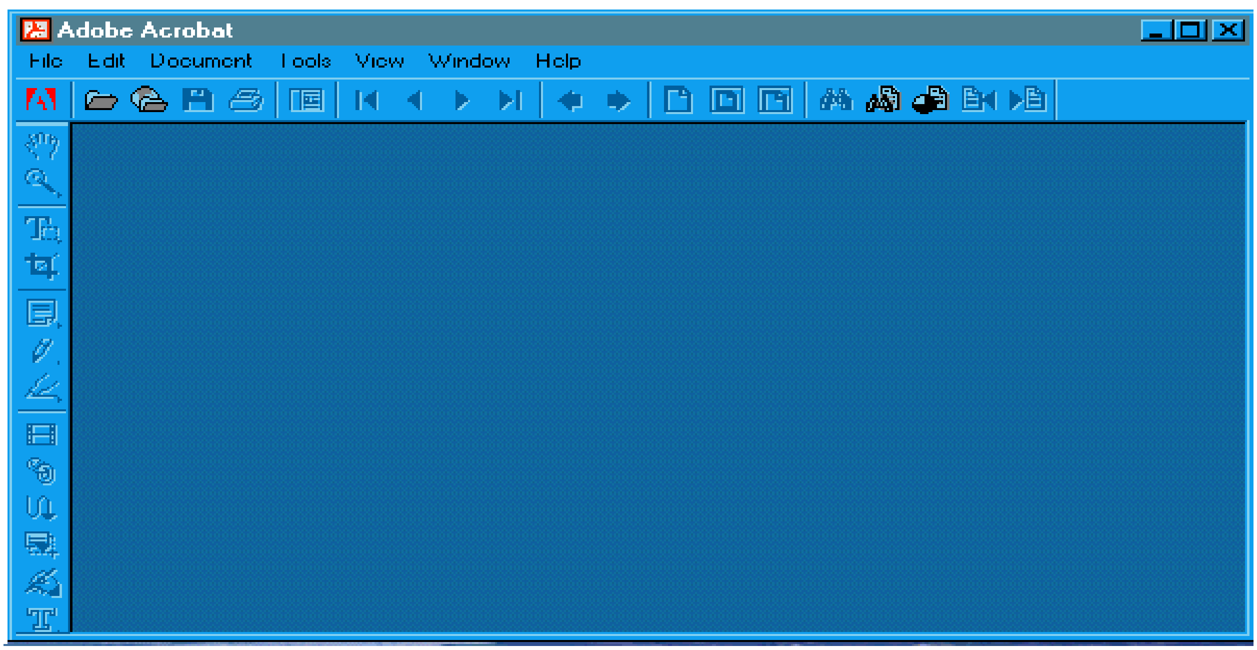


Figure 1

— Click *File* from the drop down menu. **(See Figure 2)**

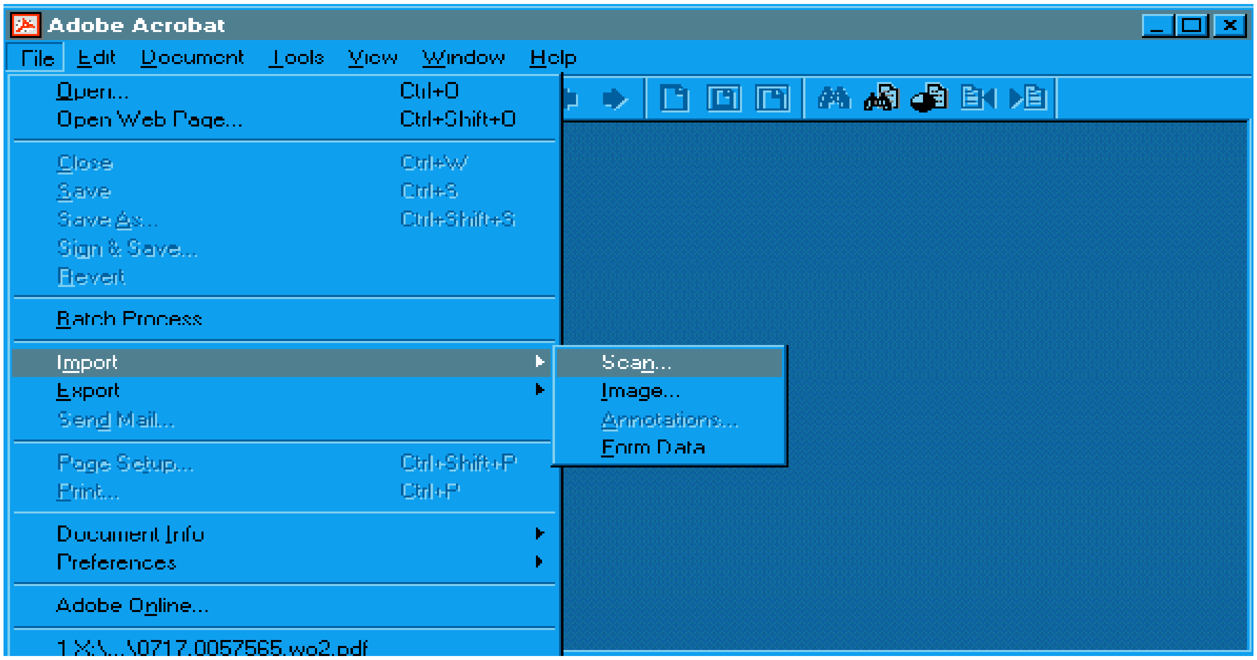


Figure 2

— Select the *Import* option.
— Select the *Scan* option.

STEP 4 The **Adobe Acrobat Scan** screen displays. **(See Figure 3)**

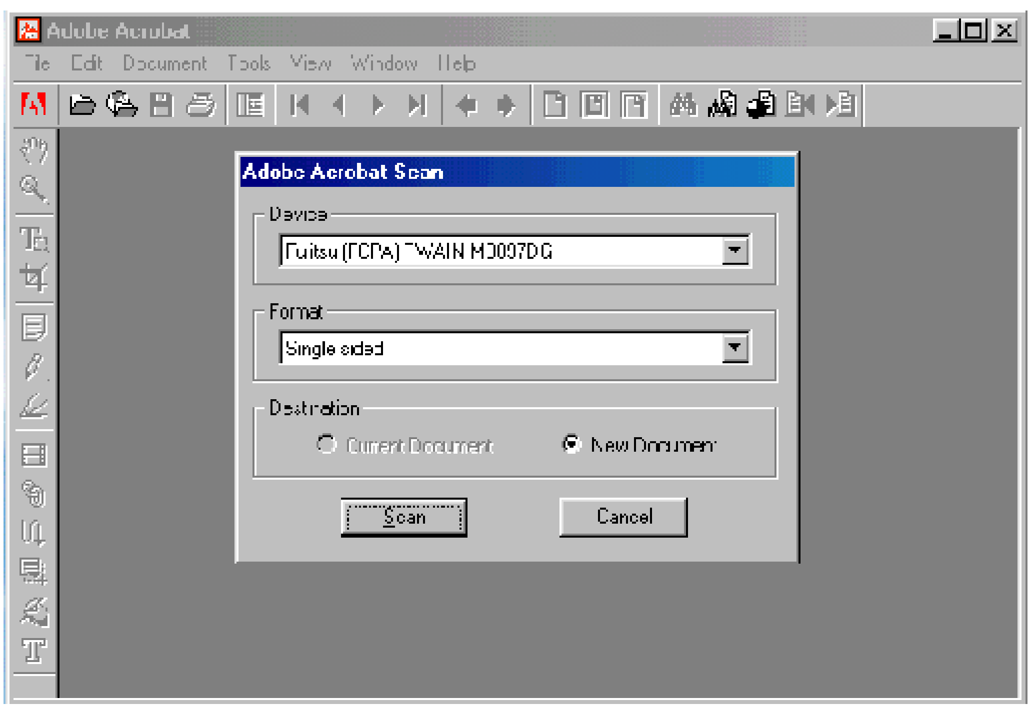


Figure 3

— Select the device for your scanning equipment.

Note: This will only need to be done the first time a document is scanned. After that, the system will always default to the correct device and will only need to be modified if the scanning equipment changes.

— Select the page format (Single Sided or Double Sided).

— Select the radio box to indicate the destination of **New Document**.

Note: Be sure the radio button for "New Document" is selected. Select the radio button "Current Document" only if you wish to add additional pages (append) to a scanned document. If so, be sure the image you would like to append is currently open and displayed on the image screen.

— Click **[Scan]** to continue.

STEP 5 A **Dialog Box** displays. **(See Figure 4)**

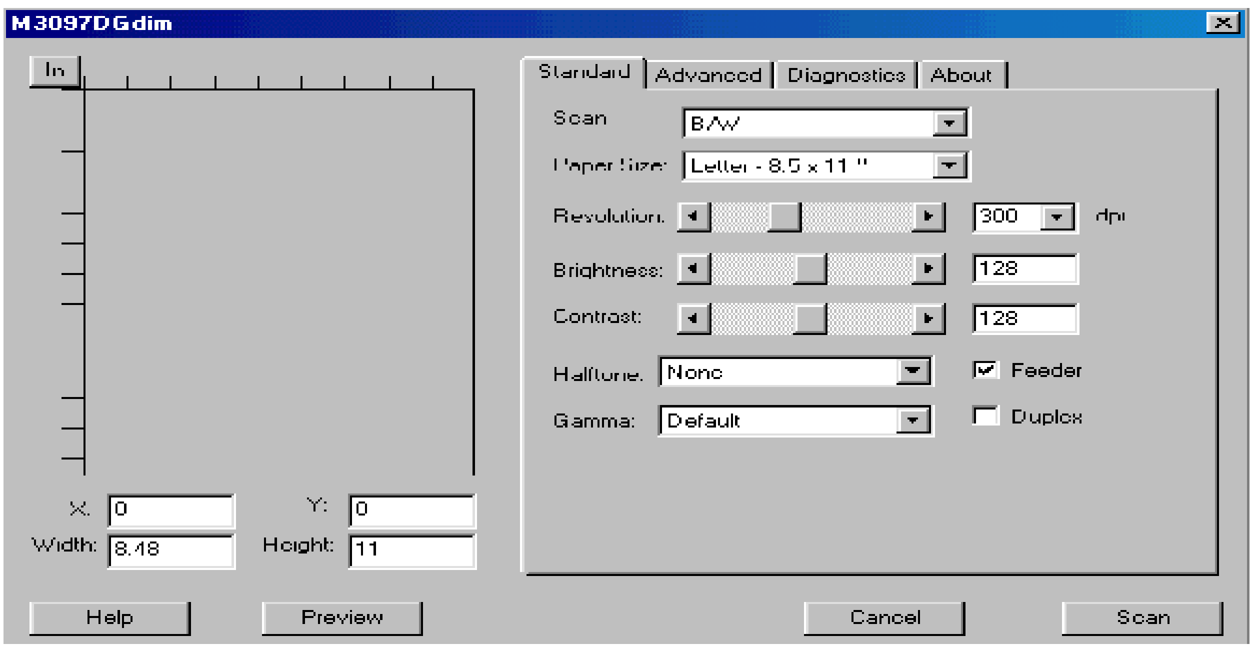


Figure 4

This box allows the adjustment of various settings for the scanned image. Using the default settings will usually be acceptable to create the scanned image. However, these settings may be adjusted if required.

— Click **[Scan]** to begin scanning the document.

STEP 6 Once all pages placed on the scanner have been scanned, the **Adobe Acrobat Scan** dialog box will display. **(See Figure 5)**

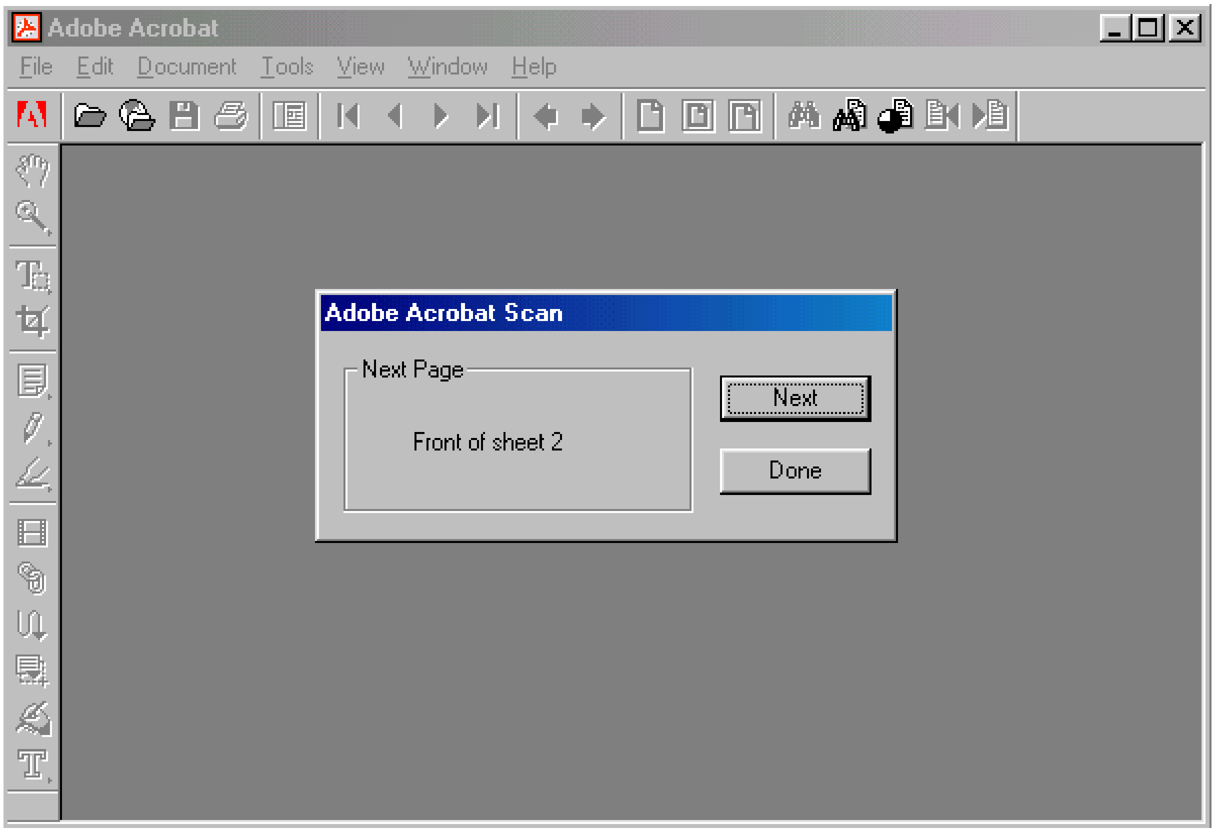


Figure 5

— Click **[Next]** if you have additional pages to scan. The additional pages will be added (appended) at the end of the document just scanned.

— Click **[Done]** when all document pages have been scanned.

Note: the number of pages reflected in the **Adobe Acrobat Scan** dialog box will always be one more than the number of pages actually scanned because the number reflected represents the page number of the next scanned page if there will be one. In the example above, one page has been scanned. Adobe Acrobat prompts that the “Next Page” would be “Front of sheet 2". **(See Figure 5)**

— When all pages have been scanned and you have clicked **[Done]**, the **Image Screen** will display.

STEP 7 Quality assure the image by selecting ***View*** from the drop down menu and clicking on ***Full Screen*** to view all pages of the image. **(See Figure 6)**

— The image will appear on the screen in full size and each page can be quality assured. (If necessary, return to Step 1 and re-scan the document if the image is unacceptable or pages are missing.) When you are finished

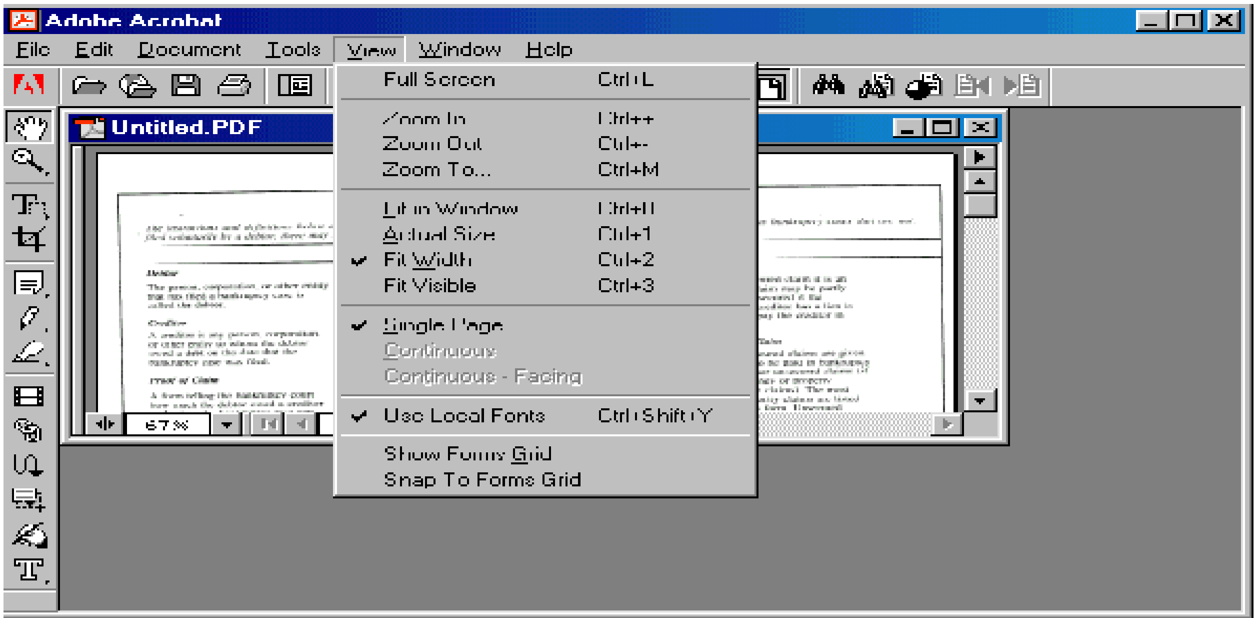


Figure 6

viewing the document, press the ***[Esc]*** key to return to the **Image Screen**.

STEP 8 Once the image is correct and complete, the file must be named and saved.

— Select ***File*** from the drop down menu, and click ***Save As***. **(See Figure 7)**

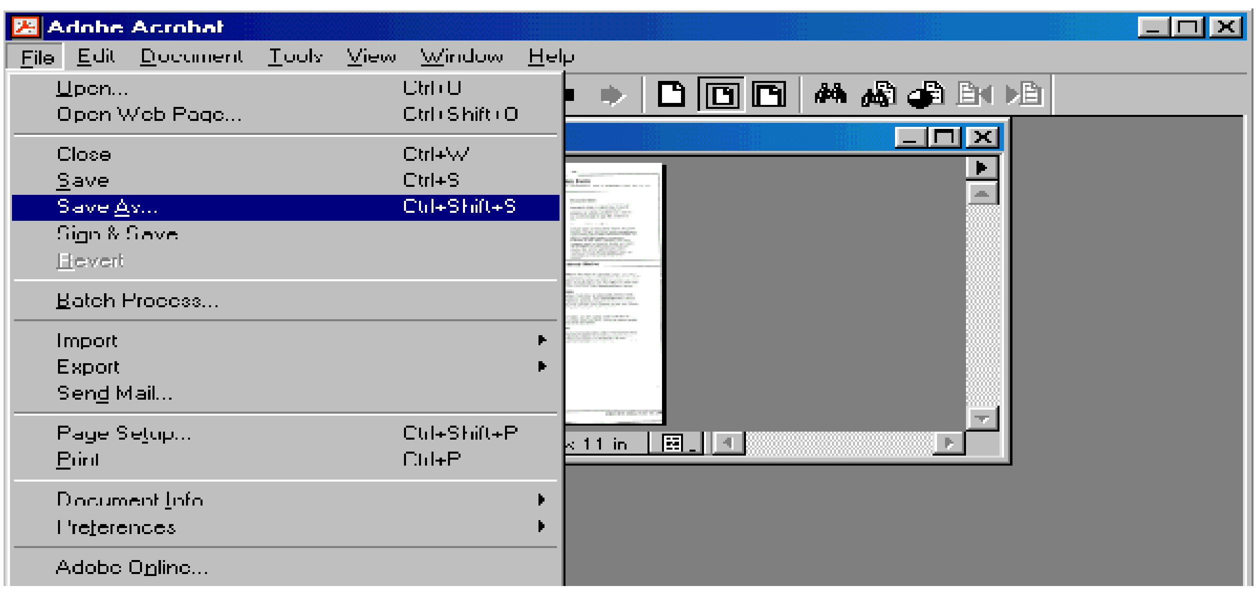


Figure 7

STEP 9 The **Save as Dialog Box** displays. **(See Figure 8)**

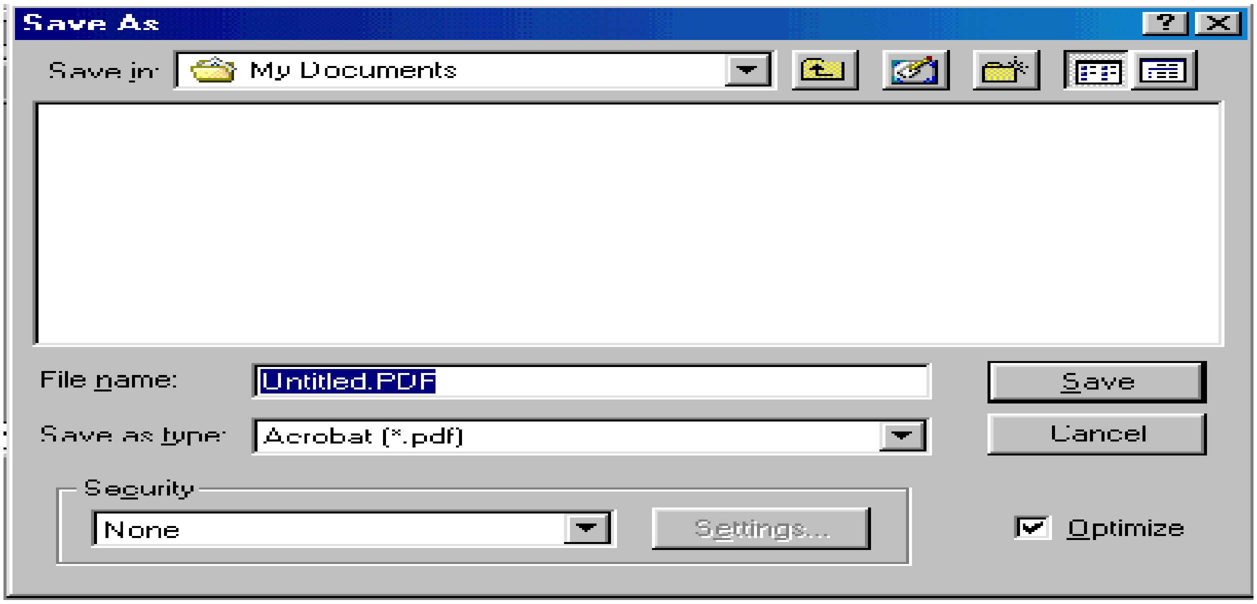


Figure 8

— Navigate to the folder where you wish to save the PDF file.

— Choose a filename and type that name in the ***File name*:** box. The *.pdf* extension will automatically be added. *(For example, if you name the file: hallmotn, the image will be saved with the name: hallmotn**.pdf**).* The PDF file will be saved on your hard drive (or floppy, if chosen) in the folder to which you have navigated. The image can then be associated to the ECF event during the docketing process.

Note: For verification purposes, the image may be viewed during docketing process in ECF to ensure that the correct image is associated with the docket entry.

— Click the **[Save]** button.

STEP 10 The document displays on the **Adobe Acrobat Image Screen**. **(See Figure 9)**

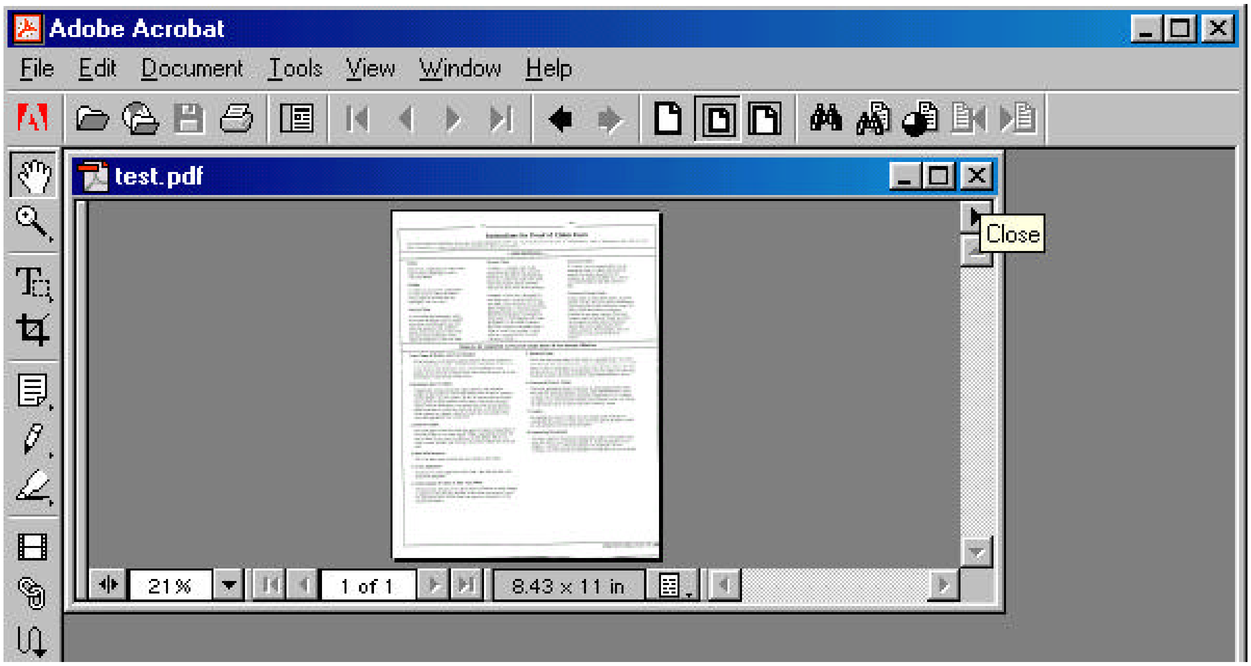


Figure 9

— The image has now been saved.

— Close the image by clicking on the “***x***” in the right corner of the image (the “***x***” on the line that contains the filename of the image).

STEP 11 A blank **Adobe Acrobat Image Screen** displays. **(See Figure 1)**

— The scanner is available to scan the next document. Repeat **Steps 1** through **10** for each document to be scanned.

Short Steps:

Step 1	Launch Adobe Acrobat
Step 2	Place document on scanning bed
Step 3	Click ‘*file*’, then ‘*import*’, then ‘*scan*’.
Step 4	Select New Document; select single or double sided; click ‘*scan*’.
Step 5	Click ‘*Done*’ when all pages have been scanned.
Step 6	Quality assure the image.
Step 7	Click ‘*File*’, then ‘*Save As*’. Name and save the image.
Step 8	Close the image document.

Merging PDF Documents

Step	Action
1	Open PDF document.
2	Document will open in Adobe Acrobat.
3	Select Document from the tool bar
4	Select Insert Pages from the screen.
5	Browse to find the document that you want to attach
6	Select appropriate document.
7	Select where you want the additional attachment to be placed.
8	Check completed document for accuracy.
9	Close Adobe Acrobat
10	The question Do you want to save changes appears. Select Yes.

Converting Word Processing Documents to PDF

There are two ways to convert documents into PDF (Portable Document Format) files. PDF files can be created from documents that are in a word processing system, or they can be created utilizing scanning equipment and Adobe Acrobat software. This module (Part I) will guide you through the process of converting word processing documents to PDF format. Part II will explain the process utilizing scanning equipment and Adobe Acrobat software.

Converting Word Processing Documents to PDF Format

(this example demonstrates the process using WordPerfect)

STEP 1 Type document in word processing; save to hard drive.

STEP 2 With the document open on the screen, click on ***File*** from the drop down menu and select the ***Print*** option. **(See Figure 1)**

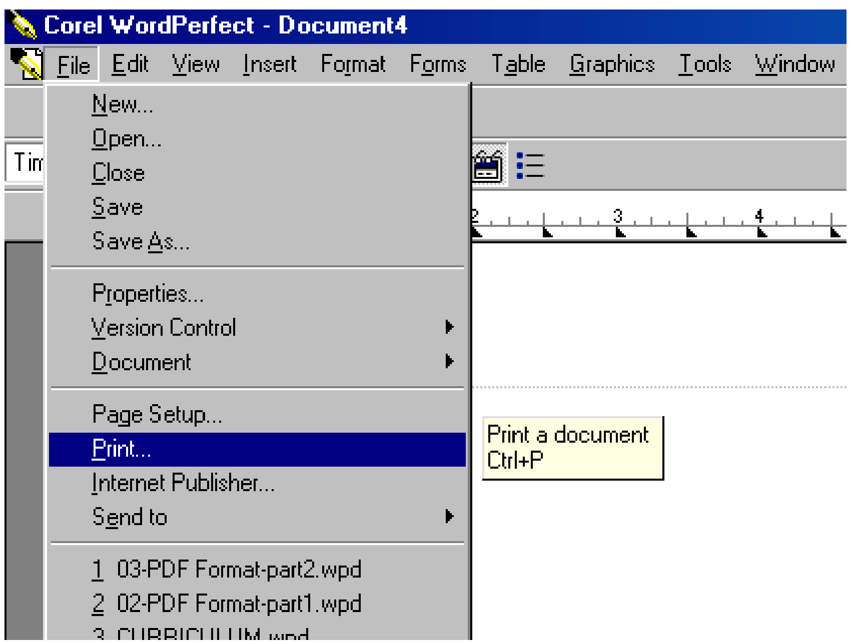


Figure 1

STEP 3 The ***Print*** dialog box displays. **(See Figure 2)**

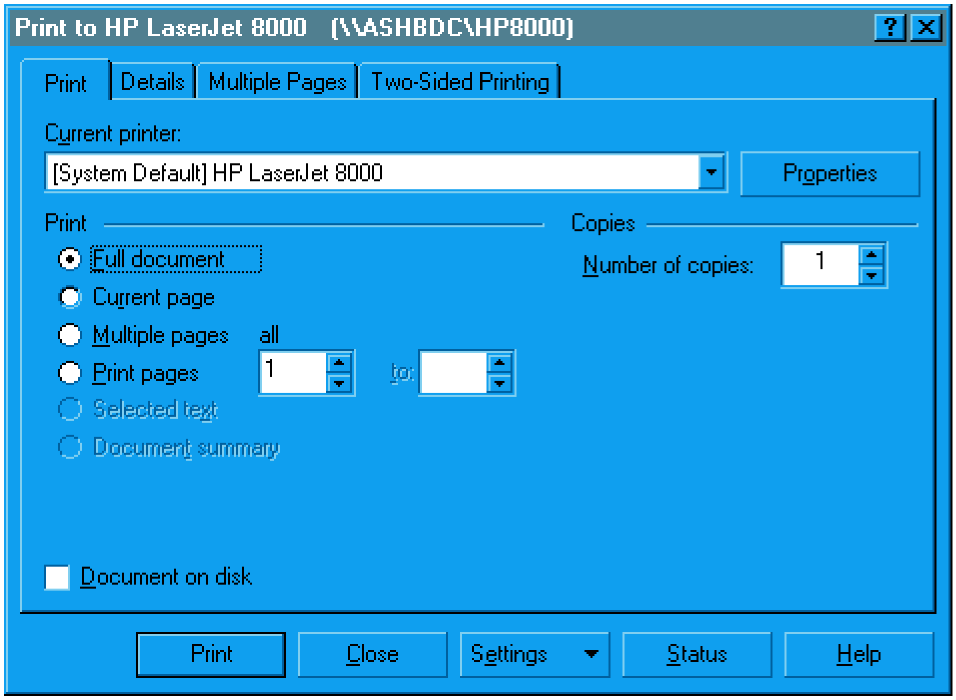


Figure 2

— Click on the down arrow · to the right of **Current or Destination printer:**

STEP 4 A list of available printers displays. **(See Figure 3)**

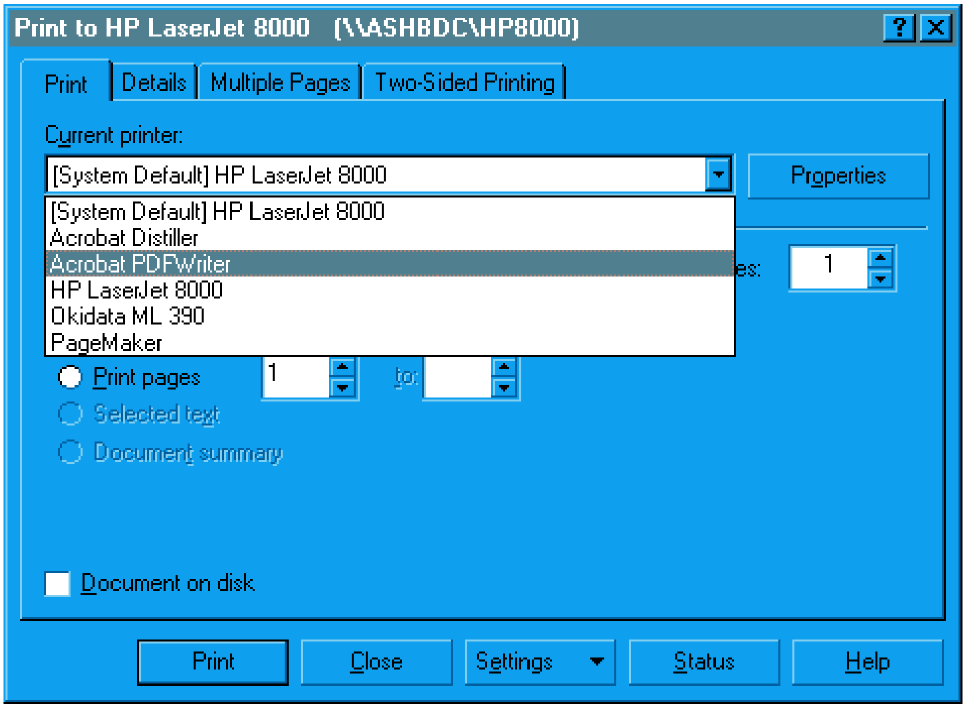


Figure 3

— Click to highlight and select the **Acrobat PDF Writer** printer**.**

— Click the **[Print]** button to create the PDF formatted document.

Note: The file will not actually print out; instead the document will be translated into PDF format.

STEP 5 The **PDF File Save As** dialog box displays. **(See Figure 4)**

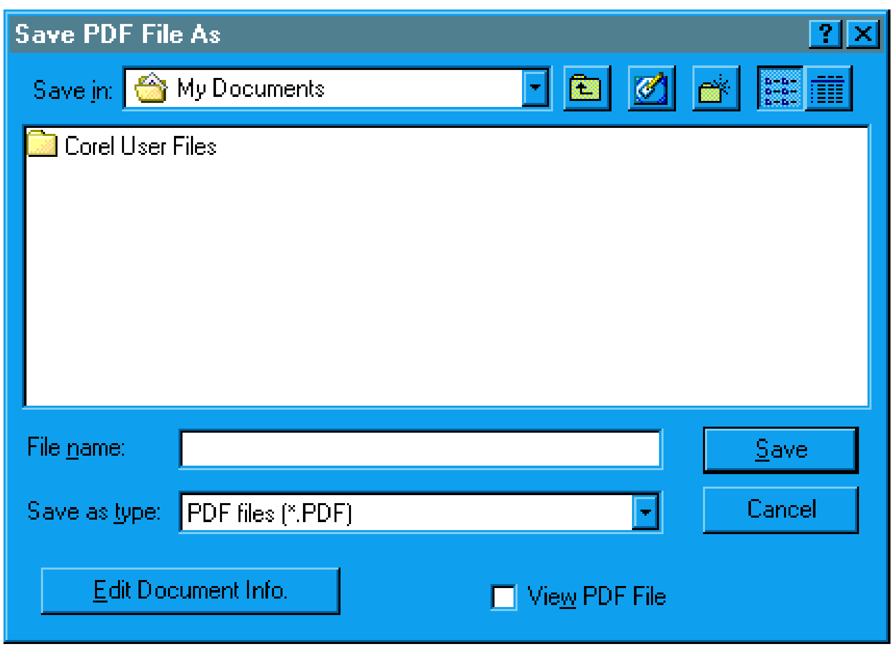


Figure 4

— Navigate to the appropriate folder (directory) where you would like to save the PDF image.

— Click inside the **File name:** box and type the name you have chosen for the image.

Note: The *.pdf* extension will automatically be added to the filename you type. *(i.e., if you name your file: hallmotn, the filename will be saved as hallmotn.pdf).*

— Click the **[Save]** button.

Important:

An Adobe PDF image file has now been created, and will be available to associate to the event during the docketing process.

The PDFimage cannot be viewed or altered in the word processing program. You will, however, be able to view the image during docketing to assure that you are associating the correct image with the docket event.

The original word processing text document remains on your hard drive as originally saved.

If you need to make changes to a document that has already been turned into an image (but not yet docketed), delete the incorrect PDF image file from the hard drive. Open the text document in word processing and make the necessary changes. Save the corrected text document. Create the PDF image file.

SHORT STEPS

Step 1 Type document in word processing program; save.
Step 2 Click '*File*'; select '*Print*'.
Step 3 Select Acrobat PDFWriter; click '*Print*'.
Step 4 Name and save PDF file.